

What does restricting CPNI mean?

When you request that your CPNI be restricted it means any person within GTE who sells GTE's Enhanced Services, like voice messaging, is restricted from viewing your records. This may necessitate that your call cannot be processed by the first GTE Representative answering your call. If your CPNI is restricted, your call may need to be transferred to a Service Representative who is allowed to view your records.

Who may view your customer records?

Anyone within GTE who does not sell an Enhanced Service, like voice messaging, may view your records if you have elected to restrict it. This means that GTE personnel like repair and installation may view your records in order to provide you with timely, high quality services.

What must you do if you would like your CPNI restricted?

If you wish to have your CPNI restricted, you must send a written, signed request to the GTE Business Office. The request will be kept on file at the Business Office. If you wish to unrestrict your CPNI at a later date, you must send another written, signed request to the GTE Business Office.

**GTE Telops
CEI/ONA PRESENTATION**

Supervisor's/Manager's Guide
and
CEI/ONA Questions & Answers

Telops Course #40184

**Telops Sales Training
Education & Training
GTE Telephone Operations
D/FW Airport, Texas**

November, 1991

BACKGROUND

This presentation on CEI/ONA for GTE employees has two parts:

- ☐ a 17-minute videotape, entitled "Learning Your FCC's, "
- ☐ this Discussion Guide which includes CEI/ONA questions and answers, and
- ☐ a five page question and answer hand-out for your employees.

Telops Sales Training has developed this training program -- the videotape especially -- to get the attention of GTE employees about this important regulatory issue.

The videotape is a spoof on "Mr. Roger's Neighborhood." By beginning the CEI/ONA training on a humorous note, the videotape de-mystifies the cumbersome and bureaucratic language of CEI/ONA regulations and simplifies the message for employees. This is followed by a Q&A discussion led by supervisors and managers, like yourself, which focuses your employees' attention on those key elements of CEI/ONA that are most relevant to them and their jobs.

It's important that all employees in Sales and Sales Support functions see this videotape and, at the very least, get a copy of the Q&A materials.

WHY IS GTE IMPLEMENTING THIS PROGRAM?

The Regional Bell Companies (RBOCs) are required by the FCC to follow specific ONA regulations. GTE Telephone Operations does not have the same FCC mandate. However, GTE has volunteered to comply with the FCC regulations pertaining to CEI, ONA, and CPNI. As the country's largest telephone company, we may have to meet the same requirements as the RBOCs in the future and therefore determined it was good business to do so now.

Also, as GTE rolls out enhanced services, and as enhanced service providers (ESPs) enter these businesses, we will have to be very careful in how we deal with ESPs and ensure that we treat them fairly. For these reasons, this training program needs to be implemented with your employees by January 31, 1992.

PREPARING YOURSELF

PREPARING MATERIALS

YOU NEED:

- ◆ Get a videotape player and monitor
- ◆ Gather Materials
 - 1. Videotape entitled "Learning Your FCC's"
 - 2. One master of the Question and Answer hand-out
 - Make one copy of Q&A hand-out for each meeting participant.
 - 3. One Records Roster per session.

An example of a completed Records Roster for a typical training session is attached to this package.

STEP

WHAT TO DO

1. Review the CEI/ONA videotape, "Learning Your FCC's", at least once.
2. Review the CEI/ONA questions and answers.
3. Read through the directions in this Guide for conducting the meeting.
4. Schedule employees in small groups of five to ten people (if feasible) for 30 - 45 minutes per group.

Notes: If you have any questions that are not answered in the Q&As, you can call Roger Gallenstein, Project Manager for ONA Implementation at the General Office in Texas (phone: 214/718-5187 or telemail: R.Gallenstein). You probably should check to see if there is a referral procedure already established within your group or area.

Training questions or requests can be forwarded to Telops Sales Training (phone:214/615-3240).

CONDUCTING THE MEETING

STEP	WHAT TO DO
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1. **Explain** the purpose of the meeting:
 - The objectives of this informal training on CEI/ONA are to:
 - a. Familiarize GTE employees with the concept of Open Network Architecture (ONA).
 - b. Describe what an Enhanced Service Provider (ESP) is and the kinds of services they can offer.
 - c. Overview what Customer Proprietary Network Information (CPNI) is, why certain customer records are restricted, and how this restriction impacts some GTE jobs.
 - d. Explain why ESPs must be treated like any other GTE customer and that discriminatory behavior towards them is not allowed by the Federal Communications Commission (FCC).
 - e. Discuss how CEI/ONA increases sales opportunities for GTE.
 - Have each participant fill out the Records Roster.
2. **Ask** open-ended questions of participants to get people thinking, such as:
 - How is the Federal Communications Commission (FCC) important to GTE's day-to-day business?
 - What is an enhanced service? What enhanced services is GTE offering now?
3. **Show** CEI/ONA videotape entitled "Learning your FCCs".
4. **Give** each participant a copy of the Q&A hand-out.

CONDUCTING THE MEETING, con'd.:

5. **Review and discuss** the key questions in the Q&A.

Note: Each question is significant for either its regulatory impact or its relevance to a GTE employee's job, so please take the time to read and discuss each question.

6. **Ask:** "What do you think was the most important information you got today from this session on CEI/ONA? How will this be used on your job?"

Encourage discussion and feedback on these questions. This will personalize the training session and reinforce the key learning points you've just covered as a group.

7. **Close** the training session:

- ✓ **Thank participants for their time and attention,**
- ✓ **Tell them that the videotape is available for them to see again,**
- ✓ **Encourage the participants to use their Q&A hand-out as a job aid, and**
- ✓ **Remind them you're available to answer any questions about CEI/ONA or to find local resources for further information.**

8. **Collect** the completed Records Roster and **mail** to the Registrar at your local Education and Training department.

This information will be entered into the training record for each participant. This is especially important to ensure GTE meets all regulatory commitments.

CEI/ONA QUESTIONS AND ANSWERS:

Q: *Why do I have to know about ONA?*

A: The FCC has issued an ONA order that the RBOC's (Regional Bell Operating Companies) must observe. This order contains compliance requirements. To meet those requirements, affected employees of the RBOC's must know what is required about two areas:

1. confidential treatment of Customer Proprietary Network Information (CPNI), and
2. non-discriminatory installation and maintenance of services.

GTE is not currently under orders by the FCC's to comply with their CEI/ONA regulations but we are voluntarily complying with these FCC regulations. It may be only a matter of time before the FCC requires us to follow the same ONA regulatory policies as the RBOC's, especially now that we are the largest independent phone company in the United States.

Q: *What's the FCC's interest in ONA?*

A: The FCC wants to promote competition in the telecommunications marketplace, and they want to assure that it will be free of anti-competitive influences. Or "a level playing field," as Mr. Bureaucrat said in the video. In this way, the FCC is trying to encourage and stimulate the development of enhanced telecommunications services.

Q: *What exactly is Open Network Architecture, or ONA?*

A: First of all, it's not architecture -- it's a concept. ONA refers to breaking the various network elements into individual service capabilities. That's called "unbundling."

Unbundling lets customers buy individual service options without having to buy packages of services "bundled" together at a single price. Unbundling is like ordering from the "a la carte" menu at your favorite restaurant. Unbundling reduces overall costs to prospective ESPs.

CEI/ONA QUESTIONS AND ANSWERS, con'd.:

Q: *What is CEI?*

A: CEI stands for "comparably efficient interconnection." CEI refers to allowing enhanced service providers (ESPs) equal access to the network.

Q: *What are examples of enhanced services?*

A: These are services transmitted over common carrier facilities that involve data processing or interactive storage and retrieval of information by subscribers. Examples include voice messaging, videotext services, point of sales credit verification, security alarm systems, and time share computer services.

Q: *Who provides enhanced services?*

A: Businesses known as Enhanced Service Providers or ESPs. They are businesses that develop specialized applications, using GTE network components, and then market them to end users. Telenet and Compuserv are examples of ESPs. GTE is also an ESP.

Q: *Does GTE offer any enhanced services?*

A: Yes, Personal Secretary and CentraNet Voice Messaging are GTE's first enhanced service offerings. We will be offering other enhanced services over the next few years, such as gateway services, FAX store and forward, and others.

Q: *Wait a minute... we're an ESP and, as a common carrier, we provide access to other ESPs, who might compete with us for our customers? Doesn't this put us in a tricky situation?*

A: It could, which is why the FCC wrote the compliance requirements. They keep us from getting into a questionable legal position, given our dual role as a regulated common carrier and as an ESP. These roles need to be clearly separated so that they don't influence our dealings with other ESPs.

CEI/ONA QUESTIONS AND ANSWERS, con'd.:

Q: *Is there anything good about ONA?*

A: Yes. For GTE, ONA will lead to new markets, new revenue streams, and increased network usage. For customers, it will mean more value added to their telecommunications.

Q: *What is CPNI?*

A: CPNI stands for Customer Proprietary Network Information. CPNI is the information held in GTE's customer records which pertains to our regulated network services, such as basic service, Touch Call, custom calling, repairs, calling information, etc. In other words, the network information that makes up a customer's monthly bill.

Q: *What does "restricting" CPNI mean?*

A: When a customer requests that their CPNI be restricted, it means that any person within GTE who is pro-actively selling our enhanced services, such as Personal Secretary or CentraNet Voice Messaging, cannot view that customer's records.

Q: *What does CPNI have to do with me and my job?*

A: GTE employees are familiar with protecting proprietary information from unauthorized parties, especially from outside the company. The FCC's CPNI rules require us to establish guidelines for protecting some of the same information from fellow employees.

Q: *Who can review a customer's account if it is restricted?*

A: Anyone within GTE who does not pro-actively sell an enhanced service, like Personal Secretary or CentraNet Voice Messaging, may view a customer's restricted record.

CEI/ONA QUESTIONS AND ANSWERS, con'd.:

Q: *How does restriction affect a customer's service?*

A: Restricting a customer's records does not affect their service. It may, however, affect GTE's ability to process their request efficiently and effectively. Restricted CPNI may necessitate that a customer cannot be processed by the first GTE service representative answering their call. That is, a customer may have to be transferred to a specific group who can view their account or may have to be called back by this group.

Q: *How does a customer have their records restricted by GTE?*

A: They must send a written, signed request to their GTE business office, asking to have their customer records restricted.

If they are doing business with an enhanced service provider (ESP) or plan on doing business with an ESP, they can request that this ESP have access to their records. [Remember Fred's Messaging Company in the videotape.]

Q: *What if a customer decides they no longer want to restrict their account?*

A: If a customer wants to un-restrict their account, they must send a written, signed request to their GTE business office.

Q: *Can an enhanced service provider (ESP) request CPNI restriction for their customers?*

A: No, all requests for CPNI restriction must be written and signed by the customer, not the ESP.

Q: *What if a customer has a non-published or non-listed phone number?*

A: Non-published and non-listed numbers are a special class of CPNI restriction and are automatically restricted from outbound calling by any sales person selling enhanced services.



RECORDS ROSTER
FORM 000450PS

DISTRIBUTION:
White - File
Yellow - Billing
Pink - Records

Schedule Period (Qtr/Yr) 4/91

Site HUNTINGTON BEACH, CA Course Number 40184

(See reverse side for instructions)

SECTION NUMBER	START DATE	END DATE	START TIME	END TIME	INSTRUCTOR (1)	INSTRUCTOR (2)	ROOM NUMBER	PRESENTED BY	STUDENT NAME	SUPERVISOR NAME	MAX	MIN	ATTD	FN	ADD	CEU	GUEST
CLASS CATEGORY	A																
CLASS ADDRESS	2081 Anchor Ct., Huntington Beach, CA																
TITLE	CEI/ONA Sales Training																
GRADE	HOURS	STUDENT SOCIAL SECURITY NO.															
1	C	1	xxx-xx-xxxx	Garcia, B.A.													
2	C	1	xxx-xx-xxxx	Maxwell, F.P.													
3	C	1	xxx-xx-xxxx	Arnett, K.A.													
4	C	1	xxx-xx-xxxx	Chen, L.E.													
5	C	1	xxx-xx-xxxx	Munoz, D.T.													
6	C	1	xxx-xx-xxxx	Paris, S.H.													
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12																	

The attached document was distributed to all GTE sales channels as a follow up to training on CEI/ONA.

This is an example of how the "refresher" information was distributed within the CSOC sales channel.

Date: 6-10-92 3:08pm
From: (K.ALTHANS):TELEMAIL:GTEGO
To: R.GALLENSTEIN:TEL
Subj: CEI/ONA REVIEW FOR CSOC REPS

----- Telemail -----

Posted: Wed, Jun 10, 1992 4:00 PM EDT Msg: DGJC-4546-6088
From: K.ALTHANS
To: J.W.WYDOCK, K.WALL, L.CRUIZ, S.M.MILLER, C.TAGUE, C.WARCHOL
CC: K.ALTHANS, R.GALLENSTEIN, K.A.COX, S.HAGUE, J.K.COLE,
M.CARLYLE,
I.CIVEY, P.SHIMOMOTO, K.M.PIETROWIAK, B.D.NOVAK
Subj: CEI/ONA REVIEW FOR CSOC REPS

Your favorite subject and mine: CEI/ONA - CPNI
Requirements.

Previously, on 4/21 I asked for suggestions on how to follow-up and see how wonderful our training has been. A mystery caller was proposed, but this process will not cover enough of the bases. That is, we would like to insure all of the representatives has some refresher training on CPNI.

In order to review for all service representatives in an easy and quick process, the following questions and answers should be reviewed by the supervisors and their service representatives. The service representatives should fill in the answers on the question sheet and then review the questions with the right answers. These questions and answers are the same as the material in the original training package.

And guess what, the timeframe for completion is August 28th. This will give the areas who have just completed training a chance to complete the Q&A's later this summer.

This CEI/ONA review only needs to be completed in those CSOC's with Voice Messaging - Personal Secretary in place.

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CEI/ONA REVIEW

COMMON CUSTOMER QUESTIONS AND ANSWERS

1) WHAT IS CPNI?

CPNI is the information held in GTE's customer records system which pertains to your regulated network services, such as, Basic Service, Touch Call, Custom Calling, repair

information, Calling information. This information basically makes up your monthly bill.

2) WHAT DOES RESTRICTING CPNI MEAN?

When you request that your CPNI be restricted it means any person within GTE who pro-actively sells GTE's enhanced services, such as Personal Secretary, cannot view your records.

3) HOW DOES THE RESTRICTION AFFECT MY SERVICE?

It does not affect your service, however it may affect GTE's ability to process your request efficiently and effectively. This may necessitate that your call cannot be processed by the first GTE Service Representative answering your call. That is, your call will have to be transferred to a specific group who may view your account or they may have to call you back.

4) WHO MAY VIEW MY ACCOUNT IF IT IS RESTRICTED?

Anyone within GTE who does not pro-actively sell an Enhanced Service, like Personal Secretary, may view your records. This means that GTE personnel like repair and installation may view your records in order to provide you with timely, high quality service.

5) HOW DO I OBTAIN INFORMATION REGARDING CPNI?

I will be glad to send you some information relative to CPNI restriction.

6) WHAT DO I DO IF I WOULD LIKE TO HAVE MY CPNI RESTRICTED?

If you would like to have your CPNI restricted, you must send a written signed request to the GTE business office. The request will be kept on file.

7) IS THERE A CHARGE TO RESTRICT MY ACCOUNT?

No, (there are no service order charges applicable).

8) WHAT IF I CHANGE MY MIND AND DO NOT WANT MY ACCOUNT RESTRICTED?

If you would like to unrestrict your account at a later date, you must send another written, signed request to the

GTE business office.

- 9) CAN I STILL ORDER AN ENHANCED SERVICE IF I RESTRICT MY ACCOUNT?

Yes, the service representative can take your order.

- 10) WHY IS GTE DOING THIS?

GTE, is following guidelines established with the FCC/State Regulatory Commissions to allow GTE to sell enhanced services.

- 11) CAN AN ENHANCED SERVICE PROVIDER REQUEST CPNI RESTRICTION FOR THEIR CUSTOMERS?

No, all requests for CPNI restriction must be a written signed request by the customer only, NOT by the Enhanced Service Provider.

- 12) WHAT IS AN ENHANCED SERVICE PROVIDER?

An Enhanced Service Provider (ESP) is a provider of an enhanced service, such as Voice Messaging.

- 13) WHAT OTHER PRODUCTS ARE ENHANCED SERVICES?

Voice Messaging is the first enhanced service GTE is offering. Other services include Packed Switch Services, Circuit Switched Line, Dedicated Video any many others to come.

- 14) WHAT IF I HAVE A NON-PUBLISHED OR NON-LISTED NUMBER?

Non-published and non-listed numbers are a special class of CPNI restriction and are automatically restricted from outbound calling by any enhanced service sales. (This means, no change in our current business procedures relative to NP and NL numbers.

CEI/ONA REVIEW
COMMON CUSTOMER QUESTIONS

1) WHAT IS CPNI?

- 2) WHAT DOES RESTRICTING CPNI MEAN?
- 3) HOW DOES THE RESTRICTION AFFECT MY SERVICE?
- 4) WHO MAY VIEW MY ACCOUNT IF IT IS RESTRICTED?
- 5) HOW DO I OBTAIN INFORMATION REGARDING CPNI?
- 6) WHAT DO I DO IF I WOULD LIKE TO HAVE MY CPNI RESTRICTED?
- 7) IS THERE A CHARGE TO RESTRICT MY ACCOUNT?
- 8) WHAT IF I CHANGE MY MIND AND DO NOT WANT MY ACCOUNT RESTRICTED?
- 9) CAN I STILL ORDER AN ENHANCED SERVICE IF I RESTRICT MY ACCOUNT?
- 10) WHY IS GTE DOING THIS?
- 11) CAN AN ENHANCED SERVICE PROVIDER REQUEST CPNI RESTRICTION FOR THEIR CUSTOMERS?

12) WHAT IS AN ENHANCED SERVICE PROVIDER?

13) WHAT OTHER PRODUCTS ARE ENHANCED SERVICES?

14) WHAT IF I HAVE A NON-PUBLISHED OR NON-LISTED NUMBER?

CEIREV.DOC

GTE CENTRANET

VOICE MESSAGING SALES TRAINING

COURSE NO. 4125/4127

for TAM and BSOC personnel

August 1991

MODULE 2: GTE CORE STRATEGIES

Overview

Module 2 presents current trends in the voice messaging market and provides an explanation of GTE's core strategies for selling C.O. based voice messaging.

Topics

Module 2 covers the following topics:

- ◆ voice messaging market trends
- ◆ why GTE wants to enter to voice messaging arena
- ◆ GTE's voice messaging strategies
- ◆ target segment

Module Objectives

At the completion of this module, you will be able to:

- ◆ Recognize current trends in the voice messaging market
- ◆ Describe why GTE wants to enter the voice messaging arena
- ◆ Define GTE's core strategy for C.O. based voice messaging services
- ◆ Explain GTE's sales/service strategy for C.O. based voice messaging
- ◆ Describe the voice messaging services pricing strategy
- ◆ Explain GTE's promotion strategy for voice messaging
- ◆ Describe GTE's distribution channel strategy for voice messaging

History and Market Trends

In 1979, the ECS company (known today as VMX) installed the first voice mail system at the 3M Company in Minneapolis, Minnesota. This system occupied approximately 900 square feet of floor space and cost over \$500,000. A staff of three people working around the clock was required to provide maintenance service and database administration. The 3M system's exclusive function was to provide voice mail service and to act as the company's corporate message center. This system established the beginnings of a new means of communications.

In 1982 and 1984, the voice messaging industry went through a major revolution. The Rolm Corporation took voice mail technology into another arena—that of integration. Integration combined voice mail and PBX technology and provided such features as automatic telephone answering, message waiting indication, and operator revert.

Like most new technologies, voice messaging has gone through an initial period of product definition and refinement, market education, and customer acceptance. The market for voice messaging has experienced rapid growth, from approximately \$84 million in 1984 to approximately \$350 to \$400 million in 1987. By 1992, the voice messaging industry will become a \$1 billion industry.

To add to the explosion of the voice messaging industry, U.S. District Court Judge Harold Greene ruled on March 7, 1988 that the regional Bell Companies (RBCs) could offer enhanced services, including voice mail, electronic mail, audiotex, and videotex. The availability of voice messaging from the RBCs should help to increase understanding and acceptance of the voice messaging industry.

Regulatory Issues

What is ONA?

Open Network Architecture (ONA) is a process by which the FCC ordered public telephone companies to make their networks more accessible to Enhanced Service Providers (ESPs) for their use in providing Enhanced Services to their customers. It involves GTE making available, in an unbundled format (some via new tariff filings), those services which are requested by the ESPs and that have sufficient demand and utility and are technically feasible.

History of ONA

The FCC in August, 1985, issued a Notice of Proposed Rule Making to reexamine the rules and policies established in their Computer Inquiry II (CI-II) Order. In this notice, they invited comment on a number of issues. One issue was the replacement of the Structural Separation Requirements with Comparably Efficient Interconnection (CEI) and ONA requirements as a prerequisite to being allowed to provide Enhanced Services on a structurally unseparated basis. The subsequent related Report and Orders are known as the FCC's Third Computer Inquiry (CI-III).

ONA vs. CEI

The FCC provided a way for the telcos to offer Enhanced Services on a structurally unseparated basis prior to ONA implementation by filing and gaining approval of a "CEI Plan" on each individual Enhanced Service. This plan must describe how the basic services used by the telco's enhanced service offering will be made available to other ESPs on a Comparably Efficient Interconnection (CEI) basis.